

ESTATE PLANNING GETTING STARTED CHECKLIST



Ever attempted the daunting task of putting an estate plan in place? You probably would not know where to begin. Without any guidance, this can easily take several weeks or months to tackle. But protecting all you've worked so hard to build and planning for your retirement is important and shouldn't be put off or ignored. Having your affairs in place now brings peace of mind to your loved ones knowing your wishes are carried after your death.

Let us help you get started.

GET ORGANIZED

GATHER YOUR DOCUMENTS

- Organize all bank/financial statements including real estate deeds, and insurance policies
- Include existing estate planning documents (ie. will, trust, power of attorney, health care directive, HIPAA release, organ donation form, living will, letter of intent, and letter of instruction), if any.

IDENTIFY ASSETS & LIABILITIES

- Document all your assets, their location, and their value
- List the following:
 - All liabilities
 - Ownership and titling
 - Designated Beneficiaries
 - Estimated value of jewelry, artwork, or other valuable items

STORE ORIGINAL DOCUMENTS

- Place documents in your bank safe deposit box or attorney's office.
- Instruct your key contacts on where your documents are located and how to access them.

DEFINE YOUR GOALS

BUILD YOUR VISION

Consider who you want to leave your assets to and why.

- How to pay your wealth forward to future generations
- Funding for children's or grandchildren's education
- Gifting to friends and partners
- Planning healthcare needs
- Philanthropic or charitable contributions

DEFINE YOUR LEGACY

Consider engaging family and close friends in your legacy and what you want to leave for them.

- Who should receive a portion of your legacy after your passing?
- How much will be left to family, friends, and charities?
- Is there a "special cause" you'd like to see outlive you?
- Which charitable organization you would like to support posthumously?

CHOOSE KEY ROLES

Select persons who will carry out your plans and put them into action.

- Representative/Executor
- Trustee
- Guardian for your children
- Agents/Attorneys in Fact

EXECUTE YOUR PLAN

CREATE A KEY CONTACT LIST

Who should be called at the time of your passing? Spouse/partner, family members, best friend, or attorney? Keep your key contact list in an envelope or give it to a responsible person.

DRAFT, EXECUTE, AND STORE DOCUMENTS

Organize properly updated documents (durable power of attorney, health care directive) that can provide legal authority to others to help manage financial assets and medical decisions on your behalf if you are mentally or physically unable.

CHOOSE KEY ROLES

Ensure assets and other documents are coordinated with your estate plan, which may require retitling certain assets or adjusting beneficiary designations.

CREATING A DIGITAL ASSET LIST

Record user IDs, account numbers and passwords for all on line accounts; keep them in an extremely secure place and update regularly.

EXECUTE YOUR PLAN (CONTINUED)

UPDATE YOUR PLAN EVERY 3 TO 5 YEARS

Review your estate plan regularly and update it after major life events:

- Marriage and remarriage
- Divorce
- Births and adoptions
- Deaths

Or changes in your financial situation:

- Purchases of large assets
- Major financial events
- When debts are paid off

OUR PROMISE

James A. Noel Law is committed to protecting everything you worked hard for and securing your generational wealth. We're devoted to helping you and your loved ones find the peace of mind you deserve.



PRACTICE AREAS


- Simple Wills
- Living Trusts
- Revocable Trusts
- Testamentary Trusts
- Durable Power of Attorney
- Physician's Directives
- Transfer Upon Death
- Elder Law
- Muniment of Title





CONTACT US


CALL US TODAY TO SCHEDULE A FREE AND
CONFIDENTIAL CONSULTATION!

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